



THINK • STIMULATE • BRIDGE

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# ANNUAL REPORT

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## 2018

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# Policy Center for the New South

## A public Good to Strengthen Public Policies

## Editorial

The 2018 issue of this Annual Report marks the fifth year of our Center's existence and will be its first edition as Policy Center for the New South.

This name change is intended, first and foremost, to better express our guiding philosophy and the central place the African continent and other countries of the South hold in our work. It also embodies the Policy Center's determination to contribute to a change in the way Africa's realities, aspirations, challenges and successes are perceived. The change is part of a continued vision that embraces a proactive South, autonomous and forward-thinking.

During 2018, the Policy Center moved up in the Global Go To Think Tank Index Report, remaining 1<sup>st</sup> in Morocco and the Maghreb, and moving up to 8<sup>th</sup> in the Middle East and North Africa region. It also ranked in the top 20 worldwide for the quality of its flagship conference, and in the top 60 for its resource and energy research and the breadth of its institutional collaboration.

In 2018, the Policy Center doubled its publications to over 200, counting joint works with the foremost organizations and thinkers across policy fields. Its +100 conferences and workshops, including Atlantic Dialogues and the Africa Think Tank Summit, gathered a steady stream of leading experts and decision makers.

This Annual Report covers the following areas: Geopolitics and International Relations; Commodity Economics and Finance; Long-Term Development; and Agriculture, Environment and Food security.

The chapter on Long-Term Development deals with the current international economic climate, characterized by the tightening monetary policy of the United States, and its trade war against China that jeopardizes the prospects of a global economic recovery.

In contrast to the protectionist wave, Africa has launched its Continental Free Trade Area, whose effective implementation calls for far-reaching domestic reforms. For North African countries, similar reforms are also needed to make the most of its internal and external trade potential.

In the case of Morocco, particular attention has been paid to the issue of employment – particularly among young people – in relation to education and training policies, and in view of the certain impact that artificial intelligence and new technologies will have on the labor market.

In the chapter dedicated to Geopolitics and International Relations, the Report devotes considerable attention to Africa, which was the subject of nine major publications in 2018 dealing with the renewal of the Euro-African partnership, the strategies of major powers on the continent, and intra-African and inter-African conflicts.

The Policy Center's publications and conferences, such as the African Peace and Security Annual Conference (APSACO), the second edition of which was held in 2018, indicate that the emergence of these conflicts - to which the United Nations and the African Union have been attempting to respond through peacekeeping operations - is often linked to poorly resolved territorial disputes or mismanaged natural resources.

Such a discussion of natural resources is a matter not only for political science or geopolitics, but also for economics. The chapter on Economics and Commodity Finance thus discusses trends related to cyclical developments and structural transformations observed in world commodity markets.

As the world goes through an environmental transition, it stands to reason to take a closer look at energy markets, and at oil and gas markets in particular. In this regard, our experts note the importance for commodity-export dependant countries of establishing mechanisms to protect against high price volatility, which inevitably affects public accounts balances and thus the ability of these countries to implement long-term development strategies.

For these reasons, experts from the Policy Center for the New South suggest that it is time to move away from the conventional segmentation applied to raw materials (agricultural/mineral/energy) when considering industrialization, in African countries in particular. Much more than the physical reality of the resource in question, it is the dynamic properties of its prices (valuation and volatility) that should be analyzed in order to decide whether to embark on the industrial transformation of the resource.

In order to have a chance of success, this transformation should go hand in hand with the achievement of food security for a booming African population. Agricultural productivity must be increased, inputs and technologies adapted to different soil types must be used, new techniques must be disseminated, land must be reorganized, and scientific research must be promoted. The conservation and restoration of ecosystems, coupled with the rational use of water resources and effective regional and international cooperation, is essential.

By making this first issue of the Policy Center for the New South's Activity Report available to decision-makers, academics, researchers and the public at large, our intention is to continue to inform and broaden reflection on the main challenges facing Morocco, Africa, and the world at large, as well as to offer an accessible platform to all those who wish to make a contribution to this common effort.

### **Karim El Aynaoui**

President, Policy Center for the New South

# The Policy Center for the New South IN A NUTSHELL



## Our goal

Broaden and deepen the thinking and analysis relating to socio-economic policies in Morocco, Africa, and the South in general.



## Our approach

Observe, decipher, analyze and assess public policies.



## Our mission

Contribute to skills development and foster dialogue and international cooperation.

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# AREAS OF FOCUS



## Long-term Development

This research area combines analyses of long-term issues, such as structural transformation and competitiveness, with those covering macroeconomic policies at the national, regional and continental levels. It also provides general public policy assessments.

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## Geopolitics and International Relations

This area covers key international geopolitical challenges, such as defense, security and power dynamics, with a particular focus on Africa. It discusses Morocco's positioning in its geostrategic environment.

.....



## Commodity Economics and Finance

This program focuses on world commodity markets, with an analysis of production and consumption centers, as well as the interaction between players. It combines situational analyses linked to short-term developments, long-term trends and underlying dynamics.

.....



## Agriculture, Environment and Food Security

This research program is based on a comprehensive approach addressing agricultural sector priorities, climate change, environmental conservation and the impact of population growth.

# WHAT'S NEW?

## They joined The PCNS

The community of Fellows of the Policy Center for the New South (PCNS) has grown with the arrival of new fellows in the field of geopolitics and international relations.



Bouchra Rahmouni



Khalid Chegraoui



Rida Lyammouri



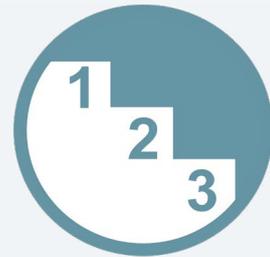
Jamal Machrouh



**36**  
Fellows

## World Ranking

The PCNS ranks first among think tanks in Morocco and the Maghreb, and 8<sup>th</sup> in North Africa and Middle East region, according to the Think Tanks and Civil Society Program's (TTCSP) "Global Go to Think Tank Index".



**#8**

Top Think Tanks in the Middle East and North Africa (MENA)

**#52**

Top Energy and Resource Policy Think Tanks Globally



**2018 GLOBAL GO TO THINK TANK INDEX**

**#16**

Best Think Tank Conference Globally

**#57**

Best Institutional Collaboration Involving Two or More Think Tanks

## The Website

1. The "Text book series" now have their own section in the Publications page. You can browse through the available books by registering.
2. Blogs have become **Opinions**, as authors share their ideas with our readers in a spirit of interaction.
3. The Policy Center for the New South is quite present in the **News** thanks to its numerous activities. We thought it would be useful to share the press coverage, published in national and international media.
4. You can now read our weekly **Newsletters** online in the About Us section.

### A "connected" PCNS

In an effort to be more accessible to its audience around the world, the Policy Center for the New South is keenly aware of the importance of digital communication. We made sure you wouldn't miss out on any of our activities and could interact with our experts, as you'll notice below.



**+23 000**

Followers on  
Social Media



**62**

Interviews on  
Youtube



**+4000**

Pictures  
on Flickr



**+50**

Newsletters



**+511 000**

Views on the Website



**20**

Podcasts

# OUR PUBLICATIONS

Reaching **212**  
in 2018, against  
112 in 2017, our  
publications  
break down to :



**41**

Policy Briefs



**21**

Policy Papers



**125**

Opinion Editorials



**8**

Research Papers



**12**

Books & Reports



**04**

Special Issues in an  
Academic Journal



**01**

Textbook



- 12** Long-term Development
- 16** Geopolitics and International Relations
- 20** Commodity Economics and Finance
- 22** Agriculture, Environment and Food Security

**THINK**





# LONG TERM DEVELOPMENT

2018 was characterized by a recovery of the global economy, a resurgence of economic momentum in Europe, and a consolidation of Asia's position.

## A favorable economic environment ...

This is the first observation made by **Fathallah Oualalou** in a Policy Paper entitled "*Un tournant pour l'économie mondiale: L'Europe se réveille, l'Asie consolide sa position*". Although optimistic about the future of the global economic climate, the author does not conceal his concern regarding neo-protectionist practices in the United States and changes in central bank policies. These fears are shared by **Uri Dadush**, in the wake of the stress experienced by stock markets starting in February of the same year. In a Policy Brief entitled "*Should Emerging Markets Worry About the Stock Market Correction?*", the author points out that such tensions are a source of increased market volatility and threaten emerging economies that are most vulnerable to a deteriorating external context.

The risks highlighted by the PCNS's researchers have gradually materialized, with the tightening of U.S. monetary policy and the series of trade wars between the United States and China. In a Policy Brief entitled "*Will the Emerging Market Turmoil be Contained?*", **Uri Dadush** and **Hamza Saoudi** discuss the impact of these shocks on emerging countries, particularly those that have faced massive capital outflows and have therefore endured a currency crisis, as is the case in Turkey and Argentina. They also describe the structural weaknesses that have compromised both countries and increased their debt levels.

## International trade: between protectionism and free trade

### The looming threat of a trade war at the forefront of discussions

The risks of a trade war jeopardizing global economic recovery have clearly been on the rise in recent months. As **Uri Dadush** points out in a Policy Brief entitled: "*Our Trade Tensions Will Persist beyond Trump*", the long-term consequences of a possible US withdrawal from global markets would be severe. However, flaws in the global trading system were visible long before the advent of Mr. Trump, and his departure from the scene will not make them disappear. Against this backdrop, the same author, together with leading experts in another Policy Brief entitled: "*Mitigating the Adjustment Costs of International Trade*", reviews possible policy responses to adjustment costs associated with international trade. They stress the importance of maintaining an open, predictable and rules-based trading system.





## Africa...in the crosscurrents of protectionist trends

As the tide of protectionism swells internationally, the African continent is moving in the opposite direction, adopting broader regional trade cooperation through the signing of the African Continental Free Trade Area (AfCFTA) agreement. In this connection, in a Policy Brief, entitled: "[Will the African Free Trade Agreement Succeed?](#)", [Uri Dadush](#) and [Rim Berahab](#) state "that this agreement is an important step towards the economic integration of the continent." They, however, stress that the implementation of this vision calls on signatories to undertake more far-reaching national reforms and tackle many of the challenges associated with the agreement itself. In the same vein, a more in-depth analysis was carried out by [Abdelaaziz Ait Ali](#) and [Rim Berahab](#) in a Research Paper entitled "[Trade Integration in the Economic Community of West African States: Assessing Constraints and Opportunities Using an Augmented Gravity Model](#)", in which they highlight the weakness of ECOWAS regional economic integration, compared to other developing regions around the world. In order to understand the underlying causes of this finding, the authors identify the drivers of inter-regional trade in ECOWAS, using a gravity model. Their findings reveal that the main obstacles to successful integration continue to be weak basic infrastructure and relatively similar productive structures across countries.

## The Mediterranean and the European Union: Failure or success of trade agreements?

Beyond intra-African integration, North Africa's relations with Europe are of particular interest. [Uri Dadush](#) and [Yana Myachenkova](#) point out in a Policy Paper entitled: "[Assessing the EU-North Africa trade agreements](#)", that the trade agreements concluded by the European Union with North African countries have often yielded disappointing results. Although they have helped generate significant volumes of trade, North African countries have made little profit from this trade, due to insufficient growth in their exports to the EU. The authors highlight the importance of undertaking domestic reforms to make North African countries more competitive in international markets and thus enable them to better leverage these trade agreements.

## Morocco

At the national level, two studies were carried out by the PCNS. The first, directed by [Eduardo Haddad](#), entitled: "[Different Dimensions of Brazil and Morocco Trade Flows: A Quantitative Assessment](#)", analyzes the different facets of trade relations between Brazil and Morocco and assesses the potential for deeper trade integration between these two major players in the South Atlantic. The second study, conducted by [Eduardo Haddad](#), [Fatima Ezzahra Mengoub](#) and [Vinicius Vale](#), entitled: "[Water Content in Trade: A Regional Analysis for Morocco](#)", explores the water content of trade in Morocco, using an application that relies on interregional input/output matrix, as well as regional information on water consumption by sector.



## Unemployment in Morocco: new developments

### Persistent youth unemployment

The MENA region continues to grapple with relatively high unemployment rates, particularly among youth. In a Policy Paper entitled: "[Youth Unemployment in the Middle East & North Africa, and the Moroccan case](#)", [Uri Dadush](#) shows that traditional unemployment analyses only partially explain youth unemployment in the MENA region. Depending on the country, there are also other equally important factors, such as an underutilized workforce, strong labor productivity growth in a few key sectors, the impact of natural resources on the economies of some countries, and the influence of certain cultural factors.

### Critical challenges for the labor market

Also in 2018, the PCNS published a study devoted to the Moroccan labor market. Against the backdrop of advanced demographic transition and strong social demand, employment will continue to be a challenge in the coming years. It can be observed in two contrasting forms, namely exclusion from the labor market and the precariousness of economic activities. The publication, entitled: "[Les enjeux du marché du travail au Maroc](#)", edited by [Karim El Aynaoui](#) and [Aomar Ibourk](#), aims to produce and accumulate useful knowledge on the potential of youth in terms of the labor force for the country's economic and social development. The publication is innovative in two respects: analytically, it provides new insights into the functioning of the labor market and the intersections between education, training and employment, thanks to appropriate theoretical frameworks. Empirically, the work conducted draws on original data and enables a dynamic approach to unemployment.

## De-industrialization and unemployment of graduates

One of the reasons that may account for the relatively high unemployment rates in the MENA region is the phenomenon of de-industrialization, which is often described as premature. Focusing on the case of Morocco, in a Policy Brief entitled: "[Deindustrialization and Employment in Morocco](#)", [Abdelaziz Ait Ali](#) and [Uri Dadush](#) explain that the downward trend in employment in the manufacturing sector is mainly due to improved labor productivity and a higher trade deficit in manufactured goods. The authors consider that to create more jobs, Morocco should pay more attention to sectors that employ a large number of people and where employment is expanding, particularly, in the tertiary sector.

In a Policy Paper, this time entitled: "[Policy proposal to Reduce Skilled Unemployment in Morocco using Public-Private Partnerships \(PPPs\): 3R-PPP – Retrain-Rebalance-Reduce-PPP](#)", [Thomas Pereira Da Silva](#) focuses on the unemployment of graduates in Morocco. He offers a simulation that measures the contribution of public-private partnerships (PPPs) in reducing the unemployment rate of skilled persons in Morocco based on a set of assumptions, thus enabling decision-makers to assess the effectiveness of public funding in PPPs in higher education.

## Artificial intelligence and employment

The PCNS researchers have attempted to envision the future of work in a context where the development of robotics, artificial intelligence and automation, in general, has been relatively rapid, prompting several experts to foresee a future where people would struggle to find a job. In a Policy Paper entitled: "[Artificial Intelligence and Political Science](#)", [Alfredo G. A. Valladão](#) offers a contribution to the effort of creating new foundations for "digital" political and social sciences in the 21st century, by exploiting cognitive sciences and insights into artificial intelligence, in order to better understand contemporary changes in social history.

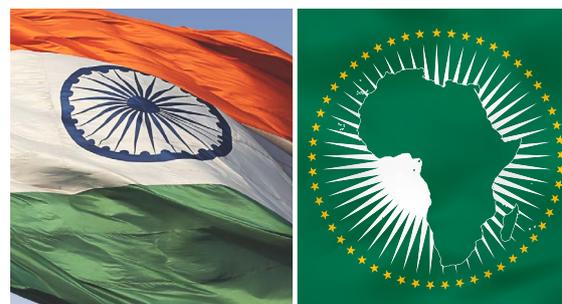
## Macroeconomic policies in developing countries

Beyond cyclical economic issues, the PCNS contributes to enriching the thinking on macroeconomic and financial stability issues in developing countries. Thus, Professor **Pierre Richard Agénor** has provided the French-speaking public with an in-depth and thorough examination of issues related to macroeconomic analysis and management in a publication entitled: "*Analyse macroéconomique et politiques de stabilisation*", Intended for graduate students, professors, researchers and professional macro-economists, the publication emphasizes the need to take into account the main structural characteristics of developing countries in economic analysis. The issue of macroeconomic stabilization was discussed in the Policy Brief entitled: "*Rôle du régime de change flexible dans l'ajustement macroéconomique : cas du Maroc*", in which **Abdelaaziz Ait Ali** reviews the costs generated by exchange rate stability in the face of external shocks, which would be partially mitigated in the presence of a more flexible exchange regime.



## India and Africa

In addition to macroeconomic policy issues, the PCNS supports regional cooperation initiatives through a work entitled "*Securing the 21<sup>st</sup> century : Mapping India-Africa Engagement*", produced in collaboration with the Observer Research Foundation, in New Delhi. This publication provides an overview of India-Africa ties and highlights the common challenges facing both regions. Such challenges are intrinsically linked to poor governance and the adoption of imported public policies that are not well suited to the circumstances of these countries. The work explores three fundamental pillars - gender, financial development and connectivity - to boost Africa-India collaboration, particularly in the areas of agriculture, health, energy, trade and investment and urbanization.



## Peace and stability in the Mediterranean

The PCNS pays great attention to cooperation between Mediterranean countries, in both economic and geopolitical terms. For the second year in a row, the think tank contributed to the third edition of the "*MED Report*", published by the Italian Institute for International Political Studies (ISPI) alongside institutions such as the Al-Ahram Center for Political and Strategic Studies, Bruegel and the Royal Institute of International Affairs (Chatham House). MED Report provides analyses of the region's political, socio-economic and security dynamics, identifying positive trends and discussing the main challenges facing the region.



# GEOPOLITICS AND INTERNATIONAL RELATIONS

2018 was a year of uncertainty, geopolitical rivalries and an upsurge in global risks. Far from a prospect of appeasement, this new anxiety-ridden international order has led to a general trend of retreat and a decline in inter-State cooperation.

## Our World Vision

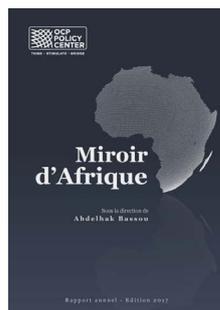
***"Africa is the last frontier of development and it is a public good for the entire world. First, because Africa pollutes little and also because its development is an extraordinary growth opportunity for the rest of the world".***

Karim El Aynaoui, President PCNS

The Policy Center for the New South (PCNS) considers that it is necessary to overcome these "sticking points" in order to foster dialogue and mutual understanding in the global Atlantic area. This is the ambition that drives our "Atlantic Dialogues" conference, which has become a crucible for North and South to meet. By contributing a forum for dialogue and a research platform based in Africa and the Arab world, our aim is to provide expertise on international issues, carried out by the South, for the South. Our vision, enshrined in our new name, is that of a New South, free of any hang-ups and capable of thinking for itself. One of our flagship publications, Atlantic Currents, is designed to provide a view of major international issues from the perspective of Africa and Latin America.

Mindful of the exponential development potential in Africa, we have made the continent our focus. The research work conducted by our experts and researchers aims to provide hands-on knowledge of the challenges and potential of the African continent. With 60 per cent of its population under 35 years of age, Africa is the new development frontier.

To this end, we have noted a series of positive initiatives in Africa and a desire to improve governance over the past year. Nevertheless, the scourge of insecurity continues to weigh heavily on this land, plagued by multifaceted conflicts rooted in growing inequalities, ethnic rivalries and resource exploitation.



Throughout this year, we have conducted a number of research studies on the peace and security dimension which, together with our work on long-term development and the continent's economy, provides unbiased insights into risks and opportunities in various African countries and regions. In 2018, we published nine works on Africa, including Miroir d'Afrique, an annual geopolitical report on Africa co-authored by African experts, under the direction of our Senior Fellow Abdelhak Bassou. We also published the Strategic Dialogues, a joint publication resulting from biannual meetings between the HEC Center for Geopolitics and the Policy Center for the New South. Furthermore, we organized several events on themes of interest to the continent, including the 2nd edition of APSACO, the annual conference on peace and security in Africa, which was attended by 100 participants and 40 experts, including numerous military, institutional and academic leaders from over 20 countries.

## Major powers and Africa

***"Africa continues to arouse the interest and envy of major powers, to the point that some internationalists do not shy away from suggesting a new form of colonization. The object of desire is certainly economic, but it cannot be achieved without political and geopolitical maneuvers."***

Abdelhak Bassou, Senior Fellow PCNS

Africa has plenty to be envied for. The continent has 97% of the world's copper, 57% of gold and 23% of uranium reserves. Essentially, the major powers are engaged in a geopolitical battle for the exploitation of these resources. This is an important factor in African development as well as a risk and opportunity for its growth. The Policy Center's research has focused on the history of this relationship between African states and major powers: first, with China, which made a breakthrough in the continent this year, then with Europe as a traditional partner, and finally with India, an emerging player on the African scene.

China has become one of the leading donors to Africa. In a Policy Brief entitled: "China's Economic Statecraft in Africa", our fellow **Hisham Aidi** examines Beijing's various economic interventions and outlines China's strategy in Africa. Reviewing the rate of approval of China's presence by the African population and elites, the author notes that African leaders are generally positive about China's role in the development of African countries.

In addition, and as part of our partnership with the *Institut Français des Relations Internationales* (IFRI), we have published a Memo on China's growing presence in the Mediterranean, in which **Alice Ekman** draws attention to the geopolitical and security implications of Chinese investments in the Mediterranean, particularly in the context of the new Silk Road. By highlighting the scale of Chinese investment in port infrastructure around

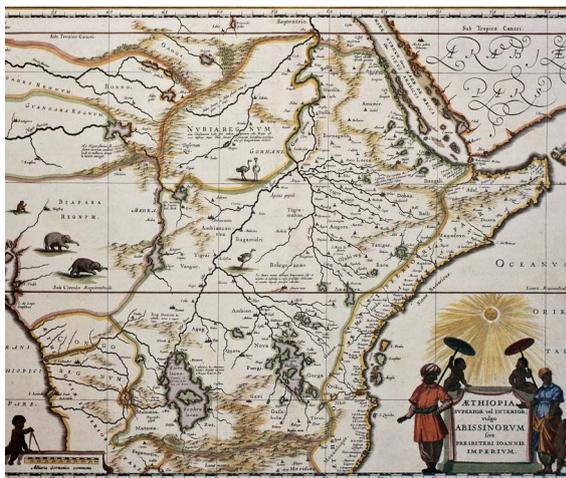
the Mediterranean, the author underlines the strategic importance of the Silk Road and the impact it will have, not only on African countries but also on their relations with Europe.



The partnership between Europe and Africa is in search of direction. This is the title of the collective work co-edited by our Senior Fellow **Larabi Jaidi** and **Ivan Martin**. This publication underscores the need for a renewal of this partnership in an African context that is both unstable and promising. It sets out a series of recommendations, focusing on African youth, proposing concrete measures on training and employment. At the geo-economic level, the publication advocates the relaunching of economic partnership agreements between Europe and Africa, multi-sector cooperation in the field of energy and greater attraction for foreign direct investment.

In conclusion, the authors argue that Europe and Africa must devise a "more positive and proactive" partnership, stating that beyond financial issues, it is also a question of "vision, overall coherence, commitment and truth." For his part, **Fathallah Oualalou**, Senior Fellow at the Policy Center, discusses this partnership along the Africa-Mediterranean-Europe axis in a Policy Brief, capitalizing on existing partnerships and synergies between the three groups. Drawing on his in-depth knowledge of China and emerging major powers, **Fathallah Oualalou** also examines India's position in Africa as both a competitor to China and a partner to the continent.

The histories of both India and Africa are based on belonging to the Third World and non-alignment. As a model of the anti-colonial struggle, India has inspired African nationalist leaders, with whom it cemented a strong bond. From a political as well as a socio-economic standpoint, India boasts a strong advantage when it comes to establishing itself in Africa. In this connection, we devoted part of our Strategic Dialogues to "India's place on the world stage". Our Senior Fellow **El Mostafa Rezrazi** focused on the history of China-India relations, detailing the implications of China's new diplomatic and trade policy in the context of the new Silk Road and the reasons for India's opposition to this corridor. **Fathallah Oualalou**, for his part, illustrates the rivalry by highlighting the complex and fascinating nature of the relations between these countries, which are characterized by common interests and competing aspirations. **F.Oualalou** examines the various factors of economic asymmetry and explores how China and India, respectively "the world's workshop" and "the world's office," perceive their respective positions in the world and wish to shape a new role for themselves within international institutions. With regard to India's relations with the Maghreb, **Abdellah Saaf**, our Senior Fellow, focuses a Research Paper on the strategy of the world's seventh largest power towards this region. In addition to recalling the historical relations between India and the Maghreb, the author explains how, at the economic level, New Delhi intends to establish itself in the region on a long-term basis, while maintaining a balance of alliances across the continent.



## Peace and security in Africa

***"Africa has suffered, since independence, from conflicts that have shaped its contemporary history to such an extent that the very mention of the continent invokes a state of conflict."***

Mohamed Loulichki, Senior Fellow PCNS

At a time when more than 90 armed conflicts are raging, and 14 UN peacekeeping operations are deployed on the African continent, a serious reflection on the issue seemed necessary. In addition to the major conferences and meetings we held on this theme, our experts have also given careful consideration to the topic. In the report of the second edition of the Annual Conference on Peace and Security in Africa (APSACO), our Senior Fellow **Rachid El Houdaigui** underscores the many and varied challenges facing peacekeeping in the continent, both at the political and legal levels, given the complex operational environments (intrusion of asymmetric threats such as terrorism or organized crime), as well as in terms of capacity (human and material resources). The report also highlights the crucial importance of African institutions and good governance at country level in building peace in Africa.

With regard to these asymmetric threats undercutting hopes for peace on the continent, our Senior Fellow **Abdelhak Bassou** notes a “sahelisation” of extremist violence and underlines the risk it poses. In his Policy Brief entitled: “*Sahélisation de la violence extrémiste : Est-ce la naissance d’une troisième génération de terrorisme ?*”, **Mr. Bassou** demonstrates how the doctrinal shift away from Al Qaeda and the retreat of ISIS have led to a total restructuring of jihadism in the Sahel. The author argues that a new generation of terrorists may be emerging. Based on closer ties with local populations, and a shift away from rigid enforcement of Sharia law, this new form of terrorism in the Sahel could attract new fighters to the region and exacerbate the situation in an already very unstable region.

The United Nations Multidimensional Integrated Stabilization Mission in Mali (UNMISMA) has, in fact, earned a reputation as the world's most dangerous UN mission. This is stated by our Senior Fellow **Rida Iyamouri** in a Policy Brief entitled: “*After Five Years, challenges facing MINSUMA persist*”. The author discusses how the lack of leadership and willingness to compromise in Mali has plunged the country into chaos and significantly slowed down the peace process that the UN mission intended to launch. In his view, there will be more violence against civilians, especially if adequate national and international protection mechanisms are not established.



In a Policy Paper, Senior Fellow **Mohammed Loulichki** addresses a structural dimension of instability in Africa: its borders. First, he explains that ongoing overt conflicts in Africa are mainly rooted in a struggle for power, the appropriation of natural resources and border issues. After being overshadowed during the first decades following the African independence movement, with the adoption of the principle of the inviolability of borders by the Organization of the African Union (OAU), the author recalls how territorial disputes have resurfaced and underlie several conflict situations across the continent. This has reached such proportions that the African Union adopted, in 2007, an Action Plan to encourage African States to delimit their borders through negotiations. Through his presentation, **Ambassador Loulichki** stresses the need for a new border order in Africa that combines negotiated corrections, large-scale cross-border projects, and mediation and dispute settlement mechanisms that enjoy the confidence of all parties.



# COMMODITY ECONOMICS AND FINANCE

2018 was a particularly active year for global commodity markets, and the "Commodity Economics and Finance" focus of the Policy Center for the New South naturally echoed this trend. Reports, Policy Briefs, blog articles, etc.: all these publications are devoted to analyzing economic developments, but also the structural changes that have affected these markets, which are now more than ever shaping the global economic and geopolitical balances in which Africa is an integral part.

## Cyclical trends and structural changes

In a Policy Brief, **Philippe Chalmin** provides an "assessment of world commodity markets in 2017." After a nearly 10% decline in prices in 2016, a 15% rebound in 2017 was beneficial for both producing and exporting countries. As the author points out, however, this very broad observation must be immediately qualified: the increase fell short of the prevailing euphoria on the stock markets, and was also very unequal, with significant variations between energy and metals, on the one hand, and agricultural products, on the other hand.

**Yves Jégourel** offers a similar analysis in his Policy Brief, entitled: "*De l'assombrissement des perspectives mondiales aux stratégies spéculatives : comment comprendre le repli des cours des métaux ?*". The author points out that the decline in the prices of virtually all industrial and precious metals may also be due to certain fundamental variables (tightening US monetary policy and the subsequent appreciation of the dollar but also declining global economic growth forecasts) and to speculative dynamics on the reference futures markets.

Understanding the reality of commodity markets also requires an examination of the structural changes that drive them over the long term. This was precisely the focus of a paper entitled: "*The Financialization of Commodity Markets: A Short-lived Phenomenon?*". Welcoming contributions from authors and Senior Fellows such as **John Baffes**, **Helyette Geman**, **Luciano Gutierrez**, **Yves Jégourel** and **Michael Tamvakis**, this work revisits the very notion of "financialization" of markets by exploring, in particular, the mechanisms through which commodity prices are set and the role played by organized derivatives markets. In a similar vein and following a Policy Brief published in 2017 on trends and cyclicity in commodity prices, **Yves Jégourel** questions the reality of commodity super-cycles, which developed in the early 2000s, a period during which index investment funds played a major role.





## Focus on energy markets

In an economic environment now strongly influenced by the imperative of an environmental transition, it stands to reason that a closer look should also be given to energy markets and in particular to oil and gas markets. In a Policy Brief entitled: "*Oil Exploration and Production in Africa since 2014 Evolution of the Key Players and their Strategies*", **Benjamin Augé** questions the impact of the collapse (or drop) of crude oil prices between 2014 and 2017 on the strategies of some of the main players in the sector in Africa. Also in the field of non-renewable energies, Sylvie Cornot-Gandolfe looks at another reference commodity: natural gas, a commodity for which international markets are constantly changing, particularly with the growth of LNG. Analyzing commodity markets is not only a matter of economics, but also of political science and geopolitics. It is with this in mind that François Gaulme chose to study the crises that have afflicted two African oil-exporting countries in the long term: the Republic of Congo and Gabon. As it covers all the structural dynamics that connect the African continent to the Atlantic zone, the fifth edition of the "*Atlantic currents*" report could not overlook commodity markets, particularly in relation to agriculture. Thus, while **Uri Dadush** questions the future of a world trading system built on commodity markets, **Fatima Ezzahra Mengoub** and **Tharcisse Guèdègbé** examine the role of cooperation strategies between Africa and Latin America, with a view to guaranteeing food security, one of the major challenges of the 21<sup>st</sup> century.

Addressing the fundamental issue of macroeconomic stability, and entitled: "*Analyse macroéconomique et politiques de stabilisation*", the publication written by **Pierre-Richard Agénor** highlights the importance for commodity-export dependent countries of instituting mechanisms to hedge against high price volatility, which has an obvious impact on public accounts balances and thus on their ability to implement long-term development strategies.

## Industrial transformation

These various publications were supplemented by blog posts. In this connection, **Yves Jégourel** suggests doing away with the conventional segmentation of commodities (agricultural/mineral/energy) when considering the matter of industrialization, particularly in African countries. Much more than the physical reality of the resource in question, it is the dynamic properties of its prices (valuation and volatility) that must be analyzed in order to decide whether or not to embark on its industrial transformation. Echoing the report on the financialization of markets, the same author stresses the importance of considering current changes in Chinese commodity derivatives markets, which could emerge in the coming years as strong competitors to the long-established United States or European markets. In an article entitled: "*The Parrot and Commodity Prices*" **Otaviano Canuto** recalls how supply and demand variables can explain the often divergent trajectories of commodities during 2018.





# AGRICULTURE, ENVIRONMENT AND FOOD SECURITY

2018 was an opportunity for African countries to continue reforms to improve the agricultural development framework and to converge on nationally and regionally agreed objectives. With this in mind, the Policy Center for the New South's panel of experts has been examining public policy issues related to agricultural production systems, agricultural trade, economic and institutional structures related to the agricultural sector, and environmental issues over the past year.

## Increasing agricultural output in Africa

As an initial area of focus, key elements of agricultural production systems have been carefully considered. In a Policy Brief, entitled: "Agricultural Investment in Africa: A Low Level... Numerous Opportunities", **Fatima Ezzahra Mengoub** described the low level of investment in agriculture in Africa as positive, demonstrating to what extent this situation provides an opportunity to rethink intensification and the structure of value chains. Managing water use for irrigation, the use of inputs, the organization of agricultural sectors and the promotion of scientific research were the four key areas on which Mengoub focused to explain priorities for public and private investment, both national and international.

For their part, **Tharcisse Guèdègbé** and **Mohammed Rachid Doukkali** focused on the use of fertilizers to intensify African agriculture. In a Policy Brief entitled: "Fertilizer Use in Africa: A Price Issue", the authors argue that the relatively low level of fertilizer use is mainly due to their

prohibitive prices. To remedy this, the two experts focus on targeted interventions needed to reduce transaction costs, improve farmers' access to these inputs and lead to higher agricultural production. According to **Isabelle Tsakok**, an expert in agricultural economics, technology transfer plays a key role in improving agricultural productivity. In a Policy Brief entitled: "An Effective Technology Transfer System", **I. Tsakok** states that the dissemination of new techniques and technologies modernizes agriculture and is a means of coping with a changing natural and economic environment. Improving technology and mastering production techniques enhance the partial productivity of each input used and increase the overall productivity of all inputs used simultaneously. In a Research Paper entitled: "*Contribution des facteurs et de la productivité globale des facteurs à la croissance agricole au Maroc : une évaluation comparée intersectorielle et inter pays*", **Mohammed Rachid Doukkali** and **Tharcisse Guèdègbé** highlight Morocco's progress in increasing overall productivity, underscoring how the country has stood out as compared to its neighbors in the Mediterranean region.





## Improving the economic and institutional environment for agricultural production

Also in 2018, the second area of focus related to the economic and institutional environment of agricultural production. This area was mainly examined by **Isabelle Tsakok** in a number of publications. Starting with a Policy Brief dedicated to the issue of agricultural markets entitled: "The Pivotal Importance of Good Access to Markets for Farmers" she explains why market access is a necessary condition for the desired transformation of agriculture and the way forward she recommends to governments. In another Policy Brief, entitled: "An Incentivizing System of Ownership and of Usufruct Rights", the expert highlights the importance of property rights, focusing on reforms that improve land security and reorganize land to increase productivity. In "Employment Creation in Non-Agricultural Sectors", a Policy Brief, **Isabelle Tsakok** also warns about the low rate of job creation outside the agricultural sector and justifies the need for economy-wide transformation to enable sufficient productivity gains in agriculture and in the long term. In a new Policy Brief, entitled: "Macro and Political Stability Essential Condition for Successful Agricultural Transformation", **Tsakok** outlines the measures in which economic instability, such as price volatility and socio-political instability, can harm the agricultural sector and highlights five key recommendations for the sector.

## Globalization and agricultural trade: debates and controversies

Agricultural trade has always been of interest to researchers and has given rise to endless debates and controversial discussions. **Isabelle Tsakok** initiated a whole debate on the profound transformation of economies. Referring to countries whose agricultural and rural sectors are still significant, she introduced a Policy Brief entitled: "The Global Context: Major Forces Shaping Our World" in which she explores the main forces that are likely to shape opportunities and constraints in global trade. In the same vein, **Will Martin**, in his Policy Brief, entitled: "Food Trade Policy and the Dietary Transition", is critical of the effects of agricultural trade on diets and discusses the consequences of globalization. For their part, **Fatima Ezzahra Mengoub** and **Tharcisse Guèdègbé** compare the food insecurity situation in two regions, Africa and Latin America, in their chapter of the Atlantic Currents annual report. Despite the efforts of governments, millions of people suffer from malnutrition and undernourishment. To remedy this situation, the two authors propose transatlantic cooperation as a way of overcoming the bottlenecks and improving populations' nutritional intake.

**Will Martin**, on the other hand, is pursuing his investigations into agricultural trade and analyzing African exports, with a critical view of certain ideologies that praise the expansion of African agricultural trade. In a Policy Brief entitled: "High-Value Agricultural Exports from Africa", he recalls the rapid growth of African agricultural products with high added value. However, he states that the contribution of African agricultural exports to total exports is limited and cannot be used as a basis for significant growth. He argues that the secret lies in developing an agricultural policy that allows producers to experiment with new products and processes, which can help them capitalize on the successes they have identified.

**Fatima Ezzahra Mengoub, Tharcisse Guèdègbé,** and **Will Martin**, also devote a Policy Brief to the role of free trade areas in improving the economic and social well-being of populations. The three authors nuance the different types of unions and outline the various requirements for successful economic integration. "**Welfare and Regional Integration Agreements : Lessons for Africa**" provides a sort of roadmap for developing countries, particularly in Africa, to boost their trade.



## Natural resource utilization and environmental protection

The last area of focus relates to optimizing the use of resources and protecting the environment. It promotes a productive, environmentally friendly agriculture that meets the needs of the population, particularly with regard to food security. Considering the vital importance of achieving food security in a changing climate, **Hynd Bouhia** focuses on the challenges related to drinking and agricultural water, energy, and sharing the Moroccan experience in optimizing the management of these resources, in a Policy Brief entitled: "**Nexus of Water-Energy-Food as an approach to face climate change**".

In the view of **Tharcisse Guèdègbé**, food security, environmental protection and improving living standards are among the key priorities of this century. With rapid population growth, extensive industrialization exerting pressure on natural resources and accelerating climate change and desertification, a number of measures are being taken to achieve land degradation neutrality. In a Policy Brief, entitled: "**Is Land Degradation Neutrality in Africa Possible?**" he explains that ecosystem conservation and restoration and the rational use of natural resources to meet the needs of the population, are essential. In order to achieve this objective of neutrality by 2050, a series of projects and initiatives are being implemented at the national and international level and must be mutually complementary. In a Research Paper co-authored by **Johan Grijzen** and **Mohammed Rachid Doukkali**, entitled: "*Evaluation de la Contribution Economique de la Surexploitation des Eaux Souterraines dans l'Agriculture au Maroc*", the focus is on the importance of groundwater in securing agricultural production in the face of climate hazards. The authors are however quick to stress the potential adverse effects that intensive agricultural development can have in terms of overexploiting a resource so vital and depletable. Fish stocks also feature in the research conducted by **Professor Doukkali**, this time in collaboration with **Abdelkabir Kamili**, a specialist in fish resources. In a Research Paper entitled: "*Système marocain de production halieutique et sa dépendance du reste du monde*", the two researchers note the sector's low responsiveness to the rise in world input prices, in contrast to its sensitivity to the rise in export prices.



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# STIMULATE

# ATLANTIC DIALOGUES EMERGING LEADERS #ADEL

The 7<sup>th</sup> edition of the Atlantic Dialogues Emerging Leaders Program (ADEL), held on December 11 and 12th, 2018 at Mohammed VI University in Ben Guerir, consolidated the global recognition of this exchange and dialogue platform for young entrepreneurs and decision-makers from the Atlantic Community countries (Africa, Caribbean, Europe, Latin America and United States).

It should be noted that in the run-up to this edition, the number of candidates soared to 3000, compared to a thousand in 2017, of whom only 45 were selected. Since 2012, the year of the launch of the ADEL, some 300 young and dynamic leaders from various backgrounds have benefited from this Policy Center for the New South initiative.

This success is due, first and foremost, to the content and, above all, to the topics addressed during the panels, workshops and other sessions dealing with politics, economics and entrepreneurship.



# HIGHLIGHTS

One of the highlights of the 2018 edition was undoubtedly the first interactive session, during which young leaders from all across the Atlantic area were called upon to focus on the future of the Atlantic community. During the debates and exchanges, which were conducted in a constructive and innovative spirit, the Emerging Leaders began by identifying the challenges and difficulties confronting the countries that make up the Atlantic community and, subsequently, proceeded to suggest possible solutions. This resulted in a Roadmap. At the instigation of Professor Bouchra Rahmouni, Senior Fellow at the Policy Center, the young leaders agreed on an action plan entitled: "Atlantic Dialogues Emerging Leaders Vision 2025". Another high point of this edition were the workshops organized to develop participants' leadership and entrepreneurial skills as well as design-thinking. In fact, and as many Emerging Leaders interviewed acknowledged, this 7th edition was full of highlights from start to finish.





## Indisputable Success

The Emerging Leaders who had the privilege of being selected to take part in this experience, are unanimous as to the quality and credibility of the program they were offered. **Patricia Ahanda**, Deputy Mayor and Entrepreneur (France), thought the program was strong and the proposed themes were of particular relevance at the regional and international levels. By taking part in this event, she considers, we are part of a positive vision of Morocco as an innovation hub. The young city councilor and entrepreneur said she was pleased with the opportunity given to young people to suggest solutions to the challenges facing the world.



*"The experience I have just had with this Emerging Leaders program will inspire my professional life as a young local elected official and entrepreneur".*

**Patricia Ahanda**, Deputy Mayor and Entrepreneur, France.



The young and dynamic Moroccan entrepreneur, **Mohamed Amine Belarbi**, co-founder and CEO of VUI 9 (cyber-security) based in Dubai and ranked by Forbes magazine among the Top 50 start-ups in the MENA region, is quick to describe the ADEL program as exceptional, compared with other similar fora. He stated that he was impressed by the high caliber of the participants involved in the panels but also the young leaders, who, in his view, "lend great credibility to the Policy Center for The New South's initiative."



**Jordan Campell** (United States), a lecturer in art and cultural policy, considers the Emerging Leaders Program to be a unique experience in the world, in that it brings together young leaders from several regions of the world and from different fields of activity. For him, there

will be a before and after the 7th edition of the ADEL insofar as he believes he will now favor a much broader definition of the Atlantic Community including Africa and South America, in contrast with the approach that limits it to North America and Europe.



Bolivian Senator **Maria Lourdes Landivar**, endorses this definition, welcoming the prominence of the South in this new concept of cooperation, which includes Africa and Latin America. Senator Landivar also pointed out that the Emerging Leaders program "contributes to

a better understanding of the situation in various countries of the Atlantic area, particularly in Africa and South America, an understanding that is so necessary for the development of our countries," she concluded.



# INTERNSHIP PROGRAM



The regular and often unannounced visits we receive from our former interns, from Morocco and elsewhere, testify to the strong and lasting ties that bind us to our community of former interns, which is growing year after year. These links would not exist if the internship program we offer did not provide added value to students and other young graduates whom we strive to prepare for better professional lives.

From the time they apply, until they receive their certificate at the end of their internship, students and young graduates who have the opportunity to spend an internship period at the Policy Center for The New South (PCNS), are tested in a rigorous and demanding manner. They are confronted with real-life situations.

The PCNS offers them the opportunity to complete a full-time internship lasting between 3 and 6 months, with the aim of enabling them to acquire practical experience and develop the necessary skills in the fields of research, event organization and project management.

This is achieved in particular through effective mentoring, involving trainees in all areas, and varying their tasks to include research, preparation of draft reports, compilation of statistical data, administrative tasks, assistance in event and media management, project management, etc.

Trainees are also encouraged to participate very actively in research seminars, roundtables, workshops and discussion groups organized by the Policy Center for the New South, on its own or with partners, addressing a wide range of issues that are of crucial importance for advancing thinking on the strategic interests of Morocco and the African continent.

## TESTIMONIALS



### Moulay Nouamane Ouzaouit

Intern

"As part of my academic training, I decided to do an internship at the Policy Center for the New South (PCNS). The three months internship provided me with new knowledge and, above all, new skills, as much as it allowed me to give the best of myself. I had the opportunity to contribute to the implementation of several projects and to acquire and develop new skills in terms of methodology and organization. Moreover, the multidisciplinary nature of the PCNS's areas of focus in terms of research and events enabled me to better understand the economic, political and other challenges faced by several regions of the world. The staff members of the

Policy Center are best described as dynamic, available and caring. A work environment where all the conditions are met to ensure better productivity and quality exchange. All these ingredients have, from day one, facilitated my integration allowing me to get the most out of the internship. I would like to express my sincere thanks to all those who have made my time at the Policy Center a rewarding experience."

“



### Hala Boumaiz

Intern

"Freshly graduated from the School of Governance and Economics in Rabat, I was selected to carry out a six-month internship in the Research Valorization department at the Policy Center for the New South. I have been offered this great opportunity which allowed me to immerse myself in the world of think tanks. By drawing on my knowledge in political science, international relations and sociology, I was asked to creatively and meticulously manage the PCNS' social networks. This exercise encouraged me to take initiatives and be autonomous in my tasks while benefiting from the support of my supervisors. At the PCNS,

interns are empowered, being entrusted with responsibilities as if they were part of the staff. For my part, I had the privilege of contributing to the organization of two high-level conferences, including the Atlantic Dialogues, the flagship event of the PCNS. This experience gave me a behind-the-scenes look at international conferences and taught me the value of working in a team spirit."

“



### Nizar Touhami Chahdi

Intern

"At the Policy Center for the New South, I had the privilege of working alongside bright, experienced, and open-minded individuals that are passionate about what they do and truly care about interns' contributions. This made my stay at PCNS an unforgettable human and professional experience. The highlight of my internship is my participation in the organization of the Atlantic Dialogues conference, during which I supervised over twenty volunteers. Entrusting an intern with such an important and sensitive task is a testimony of PCNS' appreciation for young talent. People at PCNS highly appreciate interns with strong

intellectual curiosity and have always been when I needed assistance in completing the projects and tasks to which I have been assigned. Working alongside the Policy Centers' knowledgeable and goal-driven fellows and staff, allowed me to deepen my understanding of how a think tank functions. More precisely, this opportunity permitted me to make sense of how policy-oriented research is conducted and how world-renowned conferences are built from the ground up. On a more personal level, I had the pleasure of meeting and exchanging with other like-minded young people, including Emerging Leaders, staff and volunteers, whom I share with a deep-rooted desire to positively influence policymaking and international affairs."

“

# VOLUNTEERING CLUB



Every year, several dozen young people, university students and professionals in the early stages of their careers, choose to volunteer to contribute to the preparation and running of events organized by our think tank.

This volunteer work is matched by the generosity with which the Policy Center for the New South puts these young people in direct contact with field experience, involving them in the implementation of the Center's activities, just as though they were staff members.



**Salah Eddine Taoufik**  
Atlantic Dialogues Volunteer

“The words of praise given by Mr. Karim El Aynaoui - at the end of the 7<sup>th</sup> edition of the Atlantic Dialogues - to the volunteers for their contribution to the success of this great international conference, was a recognition of the "work well done" by the team of volunteers, of which I was a part. Together with the other volunteers, we did a good job. As proof of this, I would mention the positive response of participants. Such empowerment of employees is the key to success for this major conference. This opportunity allowed me to meet new people, make contacts and become more acquainted with the world of conferences. Thank you and long live the Policy Center for the New South!”

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**34** Our events in figures

**36** High level conferences

**42** Major conferences

**48** Strategic dialogues

**51** Overseas missions

# BRIDGE

# OUR EVENTS IN FIGURES

**50**  
In Morocco

**100**  
EVENTS

**50**  
Abroad

**📍 National :**

Rabat : 38 | Marrakech : 7 | Tangier : 1 | Ben Guerir : 2 | Essaouira : 1 | Agadir : 1

**📍 International :**

Paris : 14 | Brussels : 7 | Washington DC : 1 | Lisboa : 1 | Naples : 1 | Dakar : 2 | Pekin : 3 |  
Rio de Janeiro : 2 | Tokyo : 2 | Tunis : 3 | Accra : 2 | Aix-en-Provence : 1 | Kigali : 1 | Buenos Aires : 1 | Bordeaux : 1 | Rome : 3 |  
Milan : 1 | Abuja : 1 | Madrid : 1 | Muscat : 1 | Johannesburg : 1



**100**  
**Events**



**+3500**  
**Participants**



**+70**  
**Political Figures**

During 2018, the Policy Center for the New South (PCNS) held all its main events, each of which featuring a pertinent – and in many instances a brand new – theme, at least in terms of approach and angle chosen to address it.

This has been the case for the Atlantic Dialogues, the Africa Think Tank Summit and APSACO, among others.

The PCNS' event agenda was further enriched with a newborn event: the 1<sup>st</sup> edition of the Morocco-Nigeria Strategic Dialogue, held in the Nigerian capital, Abuja.



1. **Fathallah Oualalou**, Senior Fellows PCNS
2. **Landry Signé**, Senior Fellows PCNS
3. **Laurent Bigorgne**, Director of the Moutaigne Institute
4. **Thierry de Montbrial**, Founder & President of the French Institute of International Relations (Ifri)
5. **Peter Pham**, Vice-President & Director of African Center of the Atlantic Council
6. **Bouhra Rahmouni**, Senior Fellow PCNS
7. **Jim Yong Kim**, Former President of World Bank
8. **Said Mouline**, Director of the Moroccan Agency of Energy Efficiency (AMEE)
9. **Alessandro Minuto-Rizzo**, Director of the NATO Defense College Foundation
10. **Hubert Védrine**, French Former Minister of Foreign Affairs
11. **Youssef Amrani**, *Chargé de Mission*, Royal Cabinet
12. **Fatima Harrak**, Scholar & historian



# High Level Conferences

7<sup>th</sup>  
edition

## Atlantic Dialogues

December 13 - 15, 2018 📍 Marrakech



The 7<sup>th</sup> edition of the Atlantic Dialogues (AD) international conference, held from December 13 to 15<sup>th</sup>, 2018 in Marrakech, on the topic "Atlantic Dynamics: Overcoming the Choke Points", was the opportunity to unveil the new name of our think tank: Policy Center for the New South (PCNS). The Conference addressed major geopolitical and economic issues in the Atlantic Basin, with 350 participants representing 90 nationalities. As in previous years, the Atlantic Dialogues placed young people (23-35 years old) at the forefront of the scene, including 46

emerging leaders, selected from a total of 3000 applicants, in the conference.

In addition to an interesting exchange between Madeleine Albright and Pedro Pires, former US Secretary of State and former President of Cape Verde respectively, the conference's proceedings were organized as follows: Twelve (12) plenary sessions, ten (10) small dinners and five (5) evening conversations.

### Géographical breakdown of the participants



**25%**

Middle East & North Africa



**22%**

Sub-Saharan Africa



**21%**

Europe



**16%**

North America



**11%**

South America

## Participants from various horizons



Sphere of Political  
Decision-making (**5  
Former Presidents,  
15 Former Ministers**)  
& business world



Research



Think tanks



Public Sector



International  
Organisations



Civil Society



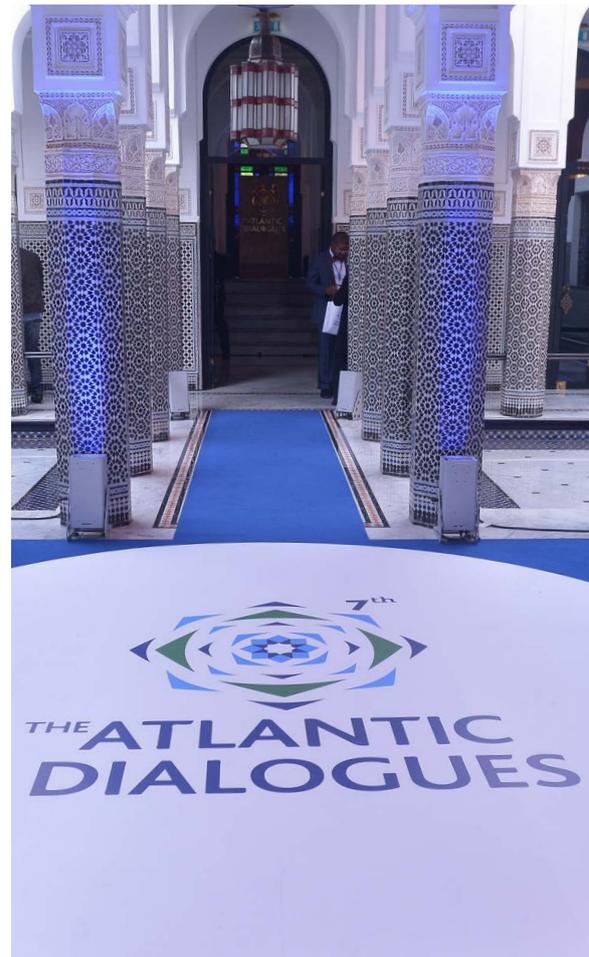
Media

## A community constantly in renewal

In keeping with the dynamism that characterizes it, the Atlantic Dialogues community was renewed by up to 40% during this 7<sup>th</sup> edition. It was attended by new participants. This is the case, among other examples, of Hafsa Fabiola, daughter of the late Nigerian election candidate Moshood Fabiola, considered to be the voice of civil society in her country.

Also participating for the very first time were Bruno Boccara (France/USA), former Chief Economist at the World Bank (WB) and founder of the Socio-Analytical Dialogues; John Sawers (Great Britain), former Ambassador and former Director of MI6; Sun Jisheng (China), Vice-President of the University of Foreign Affairs of China; Mabingué Ngom, Director of the United Nations Population Fund (UNFPA) Regional Office for West and Central Africa, and Joao Vale de Almeida (Portugal), Head of the European Union Delegation to the United Nations.

Since its creation in 2012, the Atlantic Dialogues conference has aimed to bring the South Atlantic into the mainstream global geopolitical debate. Its original and uninhibited value proposition is to engage in a debate addressing core issues on equal footing.







5<sup>th</sup>  
edition

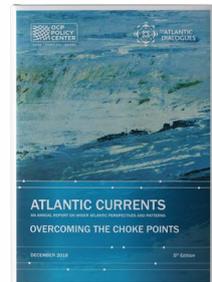
## Atlantic Currents: The world as viewed from the South



The 5<sup>th</sup> edition of the Atlantic Currents Annual Report, which bears the same title as the Conference, recognized the voice of experts from the South. The publication, whose 12 chapters were coordinated by **Bouchra Rahmouni**, Senior Fellow at the PCNS, covers topics such as migration, demography, climate change, US foreign policy and the risk of a new global financial crisis.

In addition to PCNS Senior Fellows and researchers, other recognized experts in their respective fields contributed to this latest edition of the Report. For example, **Younes Abouyoub**, Director of the United Nations Division on Governance and State-Building, contributed with a chapter on: "A perilous legacy: from the crisis of multilateralism to the decline of American discourse?" For his part, **Antonio Paulo Paranagua**, historian and former journalist at Le Monde, drafted an analysis in which he sees the Atlantic as "a triangular arena for cultural interaction".

The Atlantic Currents Report furthers the Atlantic Dialogues' spirit of intercontinental and intergenerational dialogue, making room for the conference's former Emerging Leaders. **Eric Ntumba**, a young banker from the Democratic Republic of Congo (DRC), selected from the 2017 cohort of Emerging Leaders, co-authored a chapter with **Otávio Canuto**, a Brazilian economist and Senior Fellow of the PCNS, on the risks of a new global financial crisis. Former Emerging Leader **Mbuih Zukane**, a Cameroonian researcher at the Institute of Development Studies of the University of Antwerp, co-authored a chapter with **Rim Berahab**, an economist at the PCNS, on the need to strike a new balance in the "North-South debate on climate change".



**Bouchra Rahmouni**,  
Senior Fellow, Policy  
Center for the New South



**Younes Abouyoub**,  
Director of the United  
Nations Division for  
Governance and State-  
Building in the MENA  
Region



**Youssef Mahmoud**,  
Senior Adviser,  
International Peace  
Institute



**Hafsat Abiola**, President  
and CEO, Women in Africa  
Initiative



**Rachid El Houdaigui**,  
Senior Fellow, Policy  
Center for the New South



“The chaos will go on; the United States will never become the master of the game again. Neither will Europe and China. As emerging countries fail to agree among themselves, a very confusing system is set to endure.”

**Hubert Védrine**, former French Minister of Foreign Affairs



“What everybody should understand is, we do not want to be the policemen of the World, a large part of us wants to be partners with others. There is a lack of discourse between either being an isolationist or a policeman and that is not where I think America should be”

**Madeleine Albright**, Former Secretary of State, USA



“So many catastrophic predictions have been made about Brazil in recent months... Brazil will not disappear into a hole because it is bigger than the hole!”

**Alfredo Valladão**, Senior Fellow at the PCNS and Professor at Science Po Paris



“Adapting NATO or reforming the United Nations does not mean getting rid of them. There are sometimes peacekeepers without a peace to keep, nor a mandate to keep the peace. Before we throw the baby out with the bath water, let's see if we can't have another child.”

**Joao Vale de Almeida**, Ambassador, Head of the EU Delegation to the UN



“How many connoisseurs of Africa in Brazil? And in Africa, how many specialists in Brazil? Ditto: zero! Transatlantic convergence will only take place through exchanges, for example between students, with the equivalent of Erasmus.”

**Paulo Paranagua**, Independent Researcher, former journalist at *Le Monde*



“I would have liked to see important major European leaders in Marrakech for the Global Compact on Migration. Europe must move away from the current status quo with its development policy in Africa. The benefits that come out of Africa are more substantial than the aid that comes in. We need egalitarian and dignified rather than outrageous human cooperation! It is not difficult to solve the problem, you must, however, decide if you have the will to do so!”

**María Teresa Fernández de la Vega**, President of the Spanish Council of State



“Is an international financial crisis looming? There are causes for concern that could create the perfect storm if they collided. This is possible, but remote. It's better to have small crises than to wait for the big bang.”

**Edward Scicluna**, Minister of Finance, Malta



# Major conferences

## African Economic Policy Symposium

March 2, 2018 📍 Rabat



Organized by the Policy Center for the New South, on March 2<sup>d</sup>, 2018 in Rabat, the symposium was intended to establish a continental platform where economists, policymakers and financial market experts could meet to discuss the global and regional economic challenges facing Africa.

The event was marked by fruitful exchanges, which made it possible to transform pessimistic visions into hopes for progress and growth. About twenty speakers took turns identifying the ways forward for long-term continental development, after a discussion on four main areas:

"Trade and regional integration"

"Demographic transition and the labor market"

"Financing of infrastructure"

"Industrialization and economic transformation"

Discussions and exchanges made it possible to address urgent questions from a variety of perspectives, ranging from think tanks to international organizations and public and private organizations. These questions focused in particular on the following areas:

- Is Africa doomed to suffer from inadequate infrastructure?
- What is the required balance between intra- and intercontinental trade?
- Which measures are necessary to develop Africa's industrial competitiveness?

The symposium's proceedings ended on a generally positive but nuanced note, challenging political visions that were sometimes overly optimistic but also granting African successes the encouragement they deserve.



1. Emmanuel Pinto Moreira, Regional Lead Economist for the Middle-East and North Africa, World Bank
2. Cadman Atta Mills, Former Special Adviser to the President, Ghana
3. Karim El Aynaoui, President, Policy Center for the New South
4. Matata Ponyo Mapon, Former Prime Minister, Democratic Republic of the Congo (RDC)
5. Moubarak Lo, Senior Fellow, Policy Center for the New South
6. Hind Dinh, Senior Fellow, Policy Center for the New South
7. Mounssif Aderkaoui, Director of Studies and Financial Forecasts, Ministry of Finance, Morocco



2<sup>ème</sup>  
édition

# Africa Think Tank Summit

May 9-11, 2018 📍 Rabat



The second African Think Tank Summit, organized by the PCNS, in partnership with the University of Pennsylvania, from May 9 to 11th, 2018, in Rabat, was attended by about 100 people from **20 countries** and representing **40 think tanks**. The focus of the Summit was: "**Deepening expertise and building sustainability: the contemporary challenges of African think tanks**".

The role of think tanks as independent platforms for reflection was discussed by experts from a variety of backgrounds. Among these stakeholders, we can mention:

**Olusegun Obasanjo**<sup>1</sup>, former President of Nigeria and author of the book « **Make Africa Work** », **Mounia Boucetta**<sup>2</sup>, Secretary of State to the Minister of Foreign Affairs and International Cooperation (Morocco), **Tawfik Mouline**<sup>3</sup>, Director of the Royal Institute of Strategic Studies (IRES, Morocco), **Paolo Magri**<sup>4</sup>, Vice-President and Director of the Italian Institute for International Political Studies (ISPI, Italy), **Amal Sakr**<sup>5</sup>, Deputy Director of the Future for Advanced Research and Studies (FARS, Kuwait) and **Monde Muyangwa**<sup>6</sup>, Director of the Africa Program at the Woodrow Wilson Center (USA).

# They said



**Olusegun Obasanjo,**  
Former President of Nigeria

*"Until we have good leadership and governance, we will never have a good economy in Africa."*



**Tawfik Mouline,**  
Director General of IRES

*"We should not copy solutions from elsewhere, but look for our own solutions, based on facts and arguments."*



**James g. McGann,** Director of Think Tanks and Civil Society Program (TTCSP)



**Idayat Hassan,** Director of the Centre for Democracy and Development (CDD)



**Laoye Jaiyeola,**  
CEO of the Nigerian Economic Summit Group

*"We are first and foremost partners in dialogue. We are in discussion with the government about what should be done. The idea is to walk side by side. Then we invest in research to provide proven and successful solutions. Finally, we remain independent. We never take money from public authorities."*



**Jalal Abdel-Latif,**  
Head of the Governance and Human Security Cluster of the Economic Commission for Africa (ECA) and Senior Fellow of the PCNS.

*"The dominant perception of the Sahel is that of a hopeless case: drought, poverty, high fertility... African experts know the other side of the coin: economic growth, extractive industries and collective management of water resources."*



**Lettie Tembo Longwe,** Programme Management and institutional Development Team Leader, IPSS, Ethiopia



**Hugo Sada,** Special Adviser, Dakar international Forum for Peace & Security in Africa



**Mohamed Methqal,** Ambassador, General Director of the Moroccan Agency of International Cooperation (AMCI)

2<sup>nd</sup>  
edition

# African Peace and Security Annual Conference (APSACO)

June 18 - 19, 2018 📍 Rabat



Held on June 18 and 19th, 2018, under the theme of peacekeeping operations in Africa, the second edition of the **Annual Conference on Security in Africa (APSACO)** examined the prospects and opportunities of the "peace and security spectrum", ranging from prevention to stabilization, exploring ways to effectively protect vulnerable people. The conference's proceedings contributed to ongoing discussions, which aim to strengthen the role of the African Union (AU) in peacekeeping and stabilization on the African continent.

To this effect, the Policy Center brought together specialists from the security and defense sector, academia and civil society, from countries in Africa, the Americas, Asia and Europe, in addition to diplomats representing international organizations, to discuss the following issues: the political and strategic aspects of peacekeeping operations, achievements and challenges, the protection of civilian populations and the strengthening of soldiers' capacities, the role of the African Union and civil society, as well as the intersection of North-South perspectives on peacekeeping.



**Rachid El Houdaigui**, Senior Fellow, Policy Center for the New South



**Namie Di Razza**, Brian Urquhart Center for Peace Operations - International Peace Institute



**Mr. Mahamat Saleh Annadif**, Special Representative (Minusma) and former Minister of Foreign Affairs of Chad



**Michelle Ndiaye**, President of Tana Forum and Director of the Peace and Security Program in Africa (IPSS)



**Ambassador Alessandro Minuto-Rizzo**, President of the NATO Defense College Foundation



1. **Badreddine El Harti**, Principal Security Sector Reform Adviser (UNDP)
2. **Nouzha Chekrouni**, former Ambassador to Morocco in Canada and former Delegate-Minister for the Moroccans Living Abroad
3. **General Dominique Trinquant**, Former-Head, French Military Mission to the UN
4. **Kristin de Peyron**, Head of Division, Pan-African Affairs, European External Action Service (EEAS)
5. **Zhou Yuyan**, Senior Fellow, Shanghai Institutes for International Studies (SIIS)
6. **Brigadier Irvine Nii-Ayitey Aryeetey**, Deputy Commandant of the Kofi Annan International Training Center
7. **Sara Rendtorff-Smith**, Formerly, Protection of Civilians Officer, DPKO, Interim POC Advisor, MINUSCA
8. **General Birame Diop**, Chief of Staff, Senegal Air Force



# Strategic Dialogues

## 5<sup>th</sup> edition of the Strategic Dialogues

April 11, 2018 📍 Paris

The 5<sup>th</sup> edition of the Strategic Dialogues, a biannual meeting organized on April 11th, 2018, in Paris, France, by the PCNS and the HEC Center for Geopolitics, focused on the topic: "Radioscopic look at an Emerging India in the Future, "and on the "Geopolitics of Central Africa". The proceedings are sub-divided into two parts on distinct themes. The discussions are published jointly, also biannually.

Central Africa and its hotbeds of tension were the focus of the second part of these Strategic Dialogues.



## What role for Africa and Europe in the emerging world?

April 12 - 13, 2018 📍 Paris

Organized by the PCNS, in partnership with the Montaigne Institute, in Paris, on April 12 and 13th, 2018, the conference focused on the theme: "What role for Africa and Europe in the emerging world"? The conference was attended by European and African decision-makers.



## Jihad in the Sahel: in retreat or expansion?

June 20, 2018 📍 Rabat

A dozen mainly African experts were invited by the PCNS to chair a Round Table, organized on June 20th, 2018 in Rabat, to answer numerous questions on jihadist groups active in the Sahel. Abdelhak Bassou, Senior Fellow at the PCNS, speaking in the section devoted to the fight against jihadist groups, expressed reservations about the G5 Sahel forces' ability to respond to the situation.



## Towards MED

July 17, 2018 📍 Rabat

The PCNS, in partnership with the Institute for International Policy Studies (ISPI) and the Italian Ministry of Foreign Affairs, hosted and co-organized the Towards MED conference on July 17th, 2018 in Rabat on the theme "Deradicalization and the fight against violent extremism in Europe and the MENA region". The conference was an opportunity to bring together experts and public decision-makers from Europe, Africa and the Middle East to analyze efforts to combat violent extremism in various Mediterranean countries, identify best practices and common challenges and provide recommendations to decision-makers.



## Workshop: "How to address climate change?"

October 1, 2018 📍 Paris

The Policy Center for the New South (PCNS) organized and participated in a seminar of experts, policymakers and researchers in Paris, France, on October 1, 2018 to address the issue of "decoupling" CO2 emissions from economic growth. The discussions focused on various public policies and instruments that countries and financial institutions are implementing to contribute to the global effort to combat climate change (mitigation efforts), but also to better prepare for and adapt to its impacts.



## Round table: "Political Islam after the "Arab Springs": Comparative perspectives from North Africa and Europe

October 2, 2018 📍 Paris

The Policy Center for the New South, in partnership with the Montaigne Institute, organized a Round Table on October 2d, 2018 in Paris, France, to exchange views and experiences on political Islam as it is practiced and experienced on both shores of the Mediterranean. Experts from France and Morocco discussed the relationship between power and religion in the wake of the 2011 "Arab Spring."



## 6<sup>th</sup> edition of the Strategic Dialogues

October 4, 2018 📍 Paris

"Latin America, crises and post-crisis situations" and "The African Union facing new challenges" were the two topics of the 6th edition of the Strategic Dialogues, organized on October 4th, 2018 in the French capital, at the initiative of HEC Paris (Center for Geopolitics) and the Policy Center for the New South ((PCNS).



## Morocco-Nigeria Relations: Enhancing opportunities for growth and development

October 24, 2018 📍 Abuja

The Policy Center for the New South (PCNS), in partnership with the Africa Economic Development Policy Initiative (AEDPI) and the Nigerian Economic Summit Group (NESG), organized the first edition of the Morocco-Nigeria Strategic Dialogue on October 24th, 2018 in Abuja, Nigeria. The purpose of this initiative was to create a platform for dialogue on common issues faced by Morocco and Nigeria, two strategically important countries on the African continent.



## Toward a Global Low Carbon Transition: What Sustainable Opportunities for Africa

November 8, 2018 📍 Rabat

The Policy Center for the New South, in partnership with the French Institute for International Relations (IFRI), organized a round table entitled "Toward a Global Low Carbon Transition: What Sustainable Opportunities for Africa?" on November 8th, 2018 in Rabat.

Participants were invited to discuss four main themes: opportunities and obstacles to the deployment of renewable energies (RENs) in the energy mix of North African countries; access to electricity in sub-Saharan Africa; economic potential for the deployment of RENs; and designing sustainable and smart cities in Africa.



# Overseas missions

## Brussels Forum

March 7-10, 2018  Brussels

A delegation from the PCNS, comprised of Abdelhak Bassou and Mohammed Loulichki, Senior Fellows, and Lilia Rizk, Program Officer, took part in the Brussels Forum, an annual international conference organized by the German Marshall Fund of the United States (GMF), a Washington-based think tank, which took place from 7 to 10 March 2018, on the theme: "Review, restart, reform: strategies for a time of distrust".

## XV Forte de Copacabana International Security Conference

September 21-22, 2018  Rio de Janeiro

Organized in partnership between Konrad Adenauer Stiftung, the European Union (EU) and the Policy Center for the New South (PCNS), the 15th session of the Rio Conference on International Security was held on September 21 and 22d, 2018. The agenda included three themes: conflict management, climate change and migration flows. The PCNS was represented by Senior Fellow, Mohammed Loulichki.

## Round table on the security-related issues in water management in North Africa

October 4, 2018  Paris

On behalf of the PCNS, Senior Fellow Rachid Doukkali participated in the Round Table organized by the Foundation for Strategic Research (FRS) on October 4th, 2018 in Paris, on the issue of security-related issues in water management in North Africa.

## Seminar on Belt and Road Initiative and Energy Connectivity & Innovation

October 14-23, 2018  Pekin

The Policy Center for the New South was represented by its Senior Fellow Bouchra Rahmouni at the seminar organized by the Chinese Academy of Social Science (CASS), from the 14th to the 23d of October 2018, in Beijing, on the theme "Belt and Road Initiative and Energy Connectivity & Innovation". As a reminder, the PCNS is the only African think tank to participate in this seminar.

## Conference on fighting terrorism: the challenges facing the strategic partnership between Morocco and the European Union

October 18, 2018  Paris

Senior Fellow El Mostafa Rezrazi represented the Policy Center for the New South at the Conference on the theme of "Fighting terrorism: the challenges facing the strategic partnership between Morocco and the European Union," organized on October 18th in Paris, France, at the initiative of the National Association of Youth Auditors of the Postgraduate National Defense Studies Institute (Institut des hautes études de défense nationale ANAJ-IHEDN).

## International Forum on China's Reform and Opening Up and Poverty Reduction

November 1-2, 2018  Pekin

Senior Fellow Bouchra Rahmouni represented the Policy Center for the New South at the International Forum on China's Reform and Opening Up and Poverty Reduction, which took place on November 1 and 2d, 2018 in Beijing, China. The forum was jointly organized by the Government of China and the World Bank (WB). It was attended by Chinese officials, political leaders and representatives of international organizations.

## Africa's place in the ever-changing global order

November 29-30, 2018  Johannesburg

The Policy Center for the New South, represented by its Senior Fellow, Mohammed Loulichki, took part in the seminar organized on November 29 and 30th, 2018 in Johannesburg, South Africa, by the South African think tank SAIIA, in partnership with ISS and the German Ministry of Foreign Affairs on the theme "Africa's place in an ever-changing global order."

# OUR EXPERTS



## Long-term Development

- (1) **Jalal Abdel-Latif**  
Senior Development Officer at UNECA Ethiopia
- (2) **Pierre-Richard Agénor**  
Professor at the University of Manchester U.K.
- (3) **Eduardo Amaral Haddad**  
Professor at the University of São Paulo Brazil
- (4) **Otaviano Canuto**  
Former Executive Director at World Bank and Principal at Center for Macroeconomics & Development Brazil
- (5) **Uri Dadush**  
Principal of Economic Policy International, LLC U.S.A
- (6) **Hinh T. Dinh**  
Professor at the University of Indiana USA
- (7) **Aomar Ibourk**  
Professor at the Cadi Ayyad University Morocco
- (8) **Larabi Jaïdi**  
Former professor at the University Mohamed V Morocco
- (9) **Moubarack Lo**  
President of the Emergence Institut and Advisor to the Prime Minister of Senegal
- (10) **Prakash Loungani**  
Advisor at the International Monetary Fund and Professor at Vanderbilt University USA
- (11) **Fathallah Oualalou**  
Former Minister of Economy and Finance and Former Professor at the Mohamed V University Morocco

- (12) **Landry Signé**  
Consultant at the Center for African Studies at Stanford University U.S.A
- (13) **Vera Songwe**  
Director of the Regional Office for West and Central Africa at the International Financial Company (IFC) Cameroon

## Geopolitics and International Relations

- (14) **Abdelhak Bassou**  
Former Director of the Moroccan Royal Police Institute Morocco
- (15) **Khalid Chegraoui**  
Professor of History and Political Anthropology, Institute of African Studies, Mohammed V University, Rabat Morocco
- (16) **Bouchra Rahmouni**  
Professor at the University Hassan I Morocco
- (17) **Alfredo Da Gama e Abreu Valladão**  
Professor at Sciences Po Paris France
- (18) **Marcus Vinicius de Freitas**  
Professor at the Armando Alvares Penteado Foundation Brazil
- (19) **Rachid El Houdaigui**  
Professor at the Abdelmalek Essaadi University Morocco
- (20) **Rida Lyammouri**  
International Consultant Expert on the Sahel region USA
- (21) **Mohamed Loulichki**  
Former Ambassador and Former Permanent Representative of Morocco to the UN (2014-2008) Morocco
- (22) **Aziz Mekouar**  
Former Ambassador of Morocco
- (23) **Jamal Machrouh**  
Professor of International Relations at the National School of Business and Management, Ibn Toufaïl University, Kénitra
- (24) **El Mostafa Rezzazi**  
Professor at the University Mohamed V Morocco
- (25) **Abdallah Saaf**  
Former Minister of Education and Professor at the University Morocco

## Commodity Economics and Finance

- (26) **Tayeb Amegroud**  
Founder of GPower Consultants Morocco
- (27) **Rabah Arezki**  
Head of the Commodities and Environment Department at the International Monetary Fund U.S.A
- (28) **Ezana Bocresion**  
Associate Director of Aeneas Holdings U.S.A
- (29) **Laura El-Katiri**  
International Energy Consultant UAE
- (30) **Helyette Geman**  
Professor at the University John Hopkins France
- (31) **Yves Jégourel**  
Professor at the University of Bordeaux and at the Toulouse Business School France
- (32) **Francis Perrin**  
Research Director at IRIS (*Institut de relations internationales et stratégiques*) France
- (33) **Azzedine Azzam**  
Professor of Agricultural Economics, University of Nebraska-Lincoln USA
- (34) **Mohamed Rachid Doukkali**  
Professor at the Agronomic and Veterinarian Institute Hassan II Morocco
- (35) **Rabi H. Mohtar**  
Professor at Texas A&M University USA
- (36) **Isabelle Tsakok**  
Columbia University, School of International and Public Affairs (SIPA) USA

## Agriculture, Environment and Food Security

# OUR TEAM



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**Fatima EZZAHRA LARAJ**  
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# LIST OF PUBLICATIONS

BOOKS &amp; REPORTS

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RESEARCH PAPER

BLOG/OPINION

POLICY NOTES AND PAPERS

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Should Emerging Markets Worry About the Stock Market Correction?	Policy Brief
Will the African Free Trade Agreement Succeed?	Policy Brief
Destination-Based Business Cash Flow Taxes	Policy Brief
Our Trade Tensions Will Persist Beyond Trump	Policy Brief
Africa-Europe Partnership in search of meaning Key Findings	Policy Brief
Mitigating the Adjustment Costs of International Trade	Policy Brief
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Deindustrialization and Employment in Morocco	Policy Brief
Building a Youth Euro-Med Community through Learning and Research Mobility: Incubators and Obstacles	Policy Brief
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It's evolution, baby – how institutions can improve without critical junctures	Policy Brief
Rôle du régime de change flexible dans l'ajustement macroéconomique : cas du Maroc.	Policy Brief
Un Tournant pour l'Economie Mondiale : L'Europe se réveille, l'Asie consolide sa position	Policy Paper
Policy proposal to Reduce Skilled Unemployment in Morocco using Public- Private Partnerships (PPPs): 3R-PPP – Retrain-Rebalance-Reduce-PPP	Policy Paper
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L'Inde et le Maghreb	Research Paper
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"I like the moment I break a man's ego."	Blog/Opinion
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